Procurement Desktop – Defense™

PD^2 STANDARD OPERATION PROCEDURES DESK GUIDE

US Army Corps of Engineers ®

United States Army Corps of Engineers USACE

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Version 1.0

Table of Contents

How to Use this Desk Guide

The U.S. Army Corps of Engineers (USACE) is implementing Procurement Desktop Defense (PD^2). PD^2 is referred to as the Standard Procurement System (SPS), a DOD sponsored Commercial off the Shelf (COTS) automated procurement system that is scheduled to replace the Standard Army Automated Contracting System (SAACONS) in all USACE contracting offices.

Unique within USACE is the financial based front-end module, the Corps of Engineers Financial Management System (CEFMS). This module/interface is essentially a financially driven product that presents to PD^2 a fully edited and prepared Purchase Request (PR) for processing that will result in a contractual instrument for conducting government business.

CEFMS seeks to monitor government transactions of commitments and obligations, to reduce the number of unmatched disbursements. The PR is associated with specific funding to achieve business transactions that result in the purchase of products and services. The objective of PD^2 is to work with CEFMS to achieve a financially accountable system.

PD^2 is a client-server software package that enables users to quickly build contract actions and reports along the entire life of a procurement action from Requirements to Closeout. It enables users to route documents to other PD^2 users, markup approval sheets, and attach notes for others. It also allows users to attach external Word Documents or Excel Spreadsheets to any procurement document in the system.

PD^2 business logic analyzes procurement documents by checking that the user has filled out dates, addresses, or dollar amounts correctly. However, PD^2 does not dictate all the steps necessary to complete the procurement process. For example, PD^2 does not prescribe, which approval sheet should be used for a given document or which “Required when Applicable” clause should be inserted into a given solicitation or award.

The purpose of this SOP document is to provide guidance to users where PD^2 does not. From CORE TEAM, USACE personnel have provided AMS with a number of necessary and useful standard operating procedures and processes. This guide is not intended to take the place of the on-line user’s guide, the hard-copy user’s guide, or the training manual. It is intended to give the user a birds-eye view of the typical steps -- the USACE - specific Standard Operating Procedures (SOPs) -- required to complete normal, everyday work using PD^2.

Over time, it is expected that many more users with different job functions will join the PD^2 network at USACE. Their roles and responsibilities will certainly need to be incorporated in these SOPs to keep them current and useful. Therefore, consider this Version 1.0 of the Desk Guide. As new features and processes are discovered, please be sure to add them to the desk guide. Kevin Doyle is the primary point of contact for USACE and the maintenance of this guide.

The guide is divided into four sections that include:

Section 1:	***PD^2 Birds- Eye View***	*Provides a single page "Cheat Sheet" overview of most common USACE specific processes and how they fit with PD^2.*
Section 2:	***Standard Operating Procedures***	*Provides a description of the USACE S.O.Ps.*
Section 3:	***Getting Help from the PD^2 Support Team***	*Guide to getting help from sites' support personnel. Also includes helpful resources and phone numbers.*
Appendices		*Appendix A: PD^2 Troubleshooting Guide - helps point out common pitfalls and how to overcome them.* *Appendix B: Top Twenty things to Remember when using PD^2* *Appendix C: Notes to the Systems Administrator(SA)* *Appendix D: IDIQ Type Contract Work Solutions*

Special Terms

•**ADUDAR:**
•**Approve** PR temporarily.
•Open **Document.**
•**UN**-**approve** PR.
•Complete **Document.**
•**Approve** PR again.
Release document

•**SGGGAR-** The process for Solicitations and Amendments:
• **Save** document.
• **Generate** CLINs.
• **Generate** Section J.
• **Generate** document.
• **Approve.**
• **Release.**

•**CSGGGAR-** The process for Awards and Modifications:
• **Certify** funds.
• **Save** document.
• **Generate** CLINs.
• **Generate** Section J.
• **Generate** document.
• **Approve.**
Release.

Section 1.0: USACE PD^2 Birds-Eye View

1.1: The Objectives of Birds-Eye View

The objectives of the USACE PD^2 Birds-Eye View (BEV) are to provide a one-stop "cheat sheet" for users. These "cheat sheets" cover the most common processes and include:

- *Integration of USACE business process with Standard Operating Procedures (SOPs).*
- *Demonstration of how "paperless" capabilities such as electronic routing, approval and storage apply in different scenarios.*

The processes covered in this chapter are:

- *Assign Workload*
- *Solicitation (BEV)*
- *Solicitation (SOP Notes)*
- *Post Solicitation (Evaluation / Amendment)*
- *Simplified Acquisition Procedures (SAP) (BEV)*
- *Simplified Acquisition Procedures (SAP) (SOP Notes)*
- *Award Phase*
- *Delivery Orders (BEV)*
- *Delivery Orders (SOP Notes)*
- *Funded Modification*
- *Non - Funded Modification*

 Wherever the approval icon appears in the "Birds-Eye View" documentation, the form or attachment associated with the icon is *required* to be electronically approved.

1.2 Birds-eye View Slide Inserts

1.21 Assign Workload

USACE PD² BEV **DoD Standard Procurement System**

A S S I G N W O R K L O A D

CEFMS Interface

1) CEFMS generates a Purchase Request (PR) complete with line items, requirements, and funding authorization at scheduled interface times.

Originators must use CT issuing office codes for interface to function properly

2) CEFMS pushes the PR into the PD² Database.

PD² Database

1) PR comes into PD². It arrives into the Team Leader (TL) or Designated Representative's (DR) Inbox based on a CEFMS generated buyer ID.

2) A TL or DR **workload assigns** the PR to a USER.

3) *Modifications should not be* ***workload assigned.. If you are attaching a PR to a mod with line item funding, you can workload assign PR to approval, but not to award.***

S.O.P

User's Inbox

1) USER receives in the Inbox a Blue folder that houses the PR package.

2) USER then drags the assigned PR package from the Inbox to the *Active* cabinet.

3) USER opens *Active* cabinet and renames the blue folder the same as the CEFMS generated PR+C number.

- Once PR package has been **workload assigned**, Blue Folder is created and the PALT Clock Starts.

S.O.P **S.O.Ps & USER INSTRUCTIONS**

<u>S.O.Ps:</u>
•The PR should remain un-approved when possible in order for CEFMS to modify the existing PR.

•Refer to Page 19 Section 2.4.1 Procedures developed by MVK as recommended method

<u>S.O.Ps:</u>
•Users will have one *Active* cabinet on their desktop in which all current work is done.
•Log off if idle for more than 20 minutes

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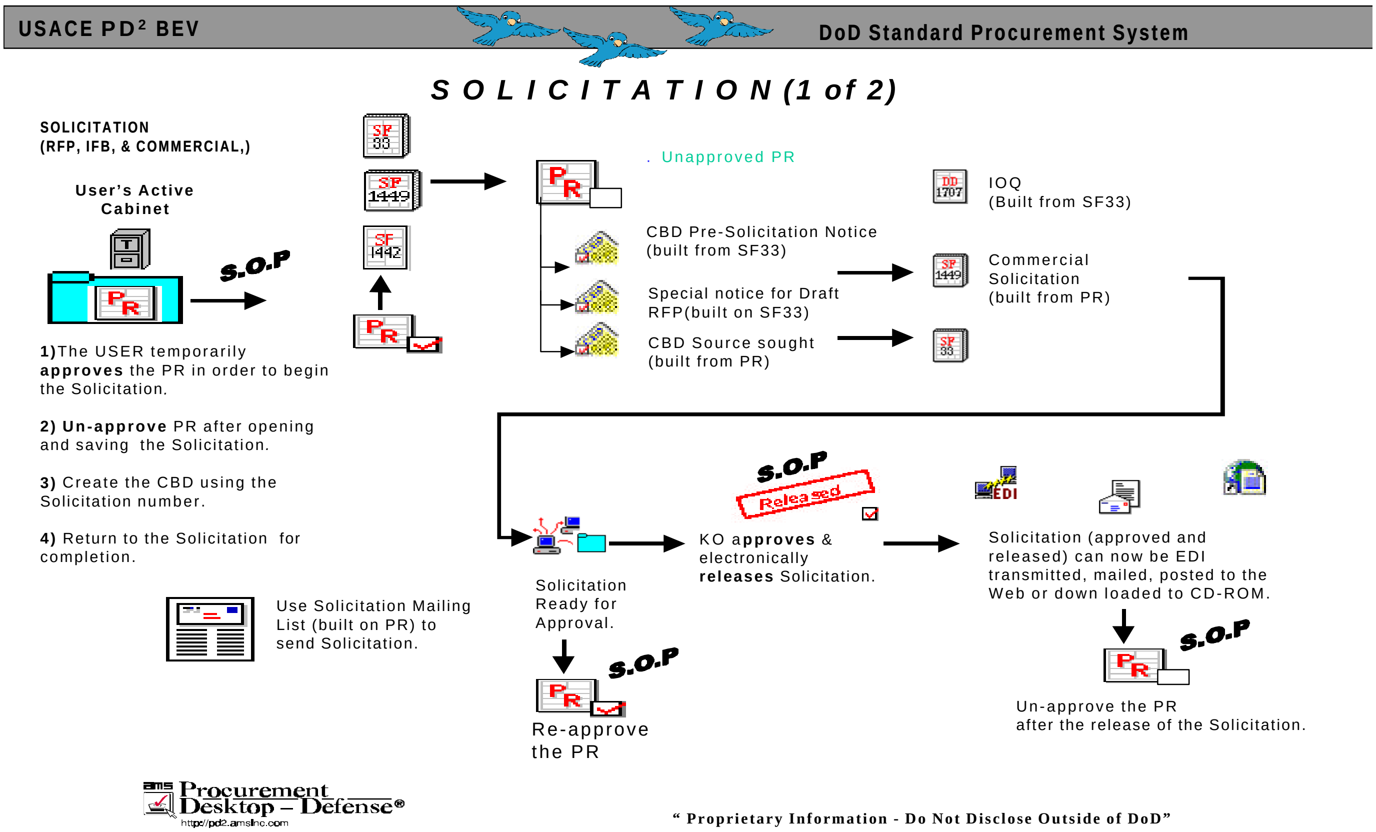
1.22 Solicitation



1.23 Solicitation (SOP Notes)

Additional notes to explain the processes involved with the Solicitation Phase

USACE PD² BEV DoD Standard Procurement System

SOLICITATION (2 of 2)

S.O.P S.O.Ps & USER INSTRUCTIONS

S.O.Ps:

Creating a CBD in PD²: Select Prepare Menu Option. Save to CBD Transmit Directory. Establish a shared location where the CBD can be saved.
CORE TEAM/Processing Centers needs to develop a standard location/path for saved items

•*Refresh clauses*: Users shall hit **refresh** button on Clauses tab before **release** of the Solicitation in PD² to bring in the most current clause updates from the FAR.

•*The Use of CBDnet* is also an authorized means of distribution. CBD will then be FTP out to CBDnet.

•**SGGGAR-** The process for Solicitations and Amendments:
Save document.
Generate CLINs.
Generate Section J.
Generate document.
Approve.
Release.

•**ADUDAR:**
Approve PR temporarily.
Open **Document.**
UN-approve PR.
Complete **Document.**
Approve PR again.
Release document.

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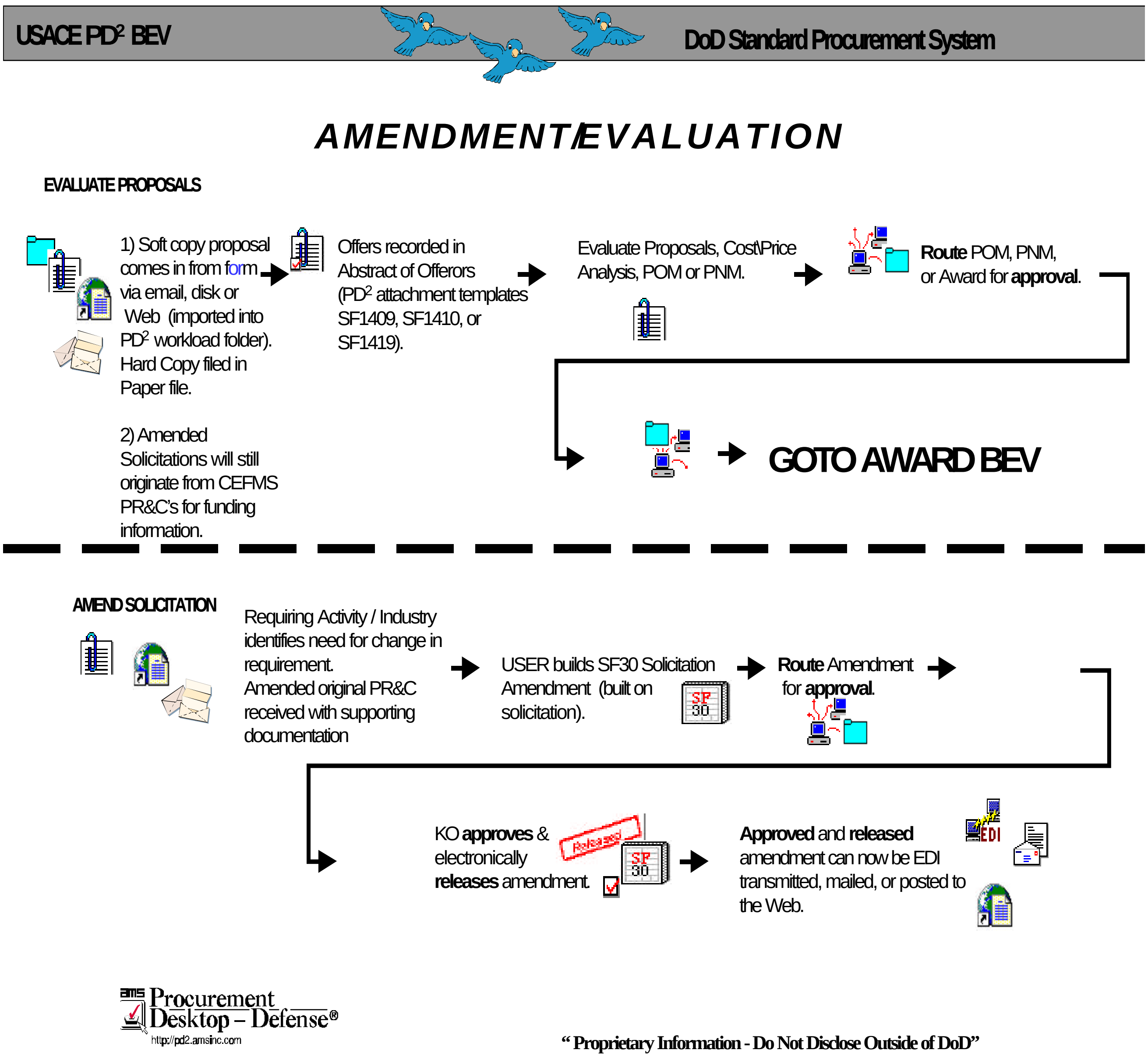
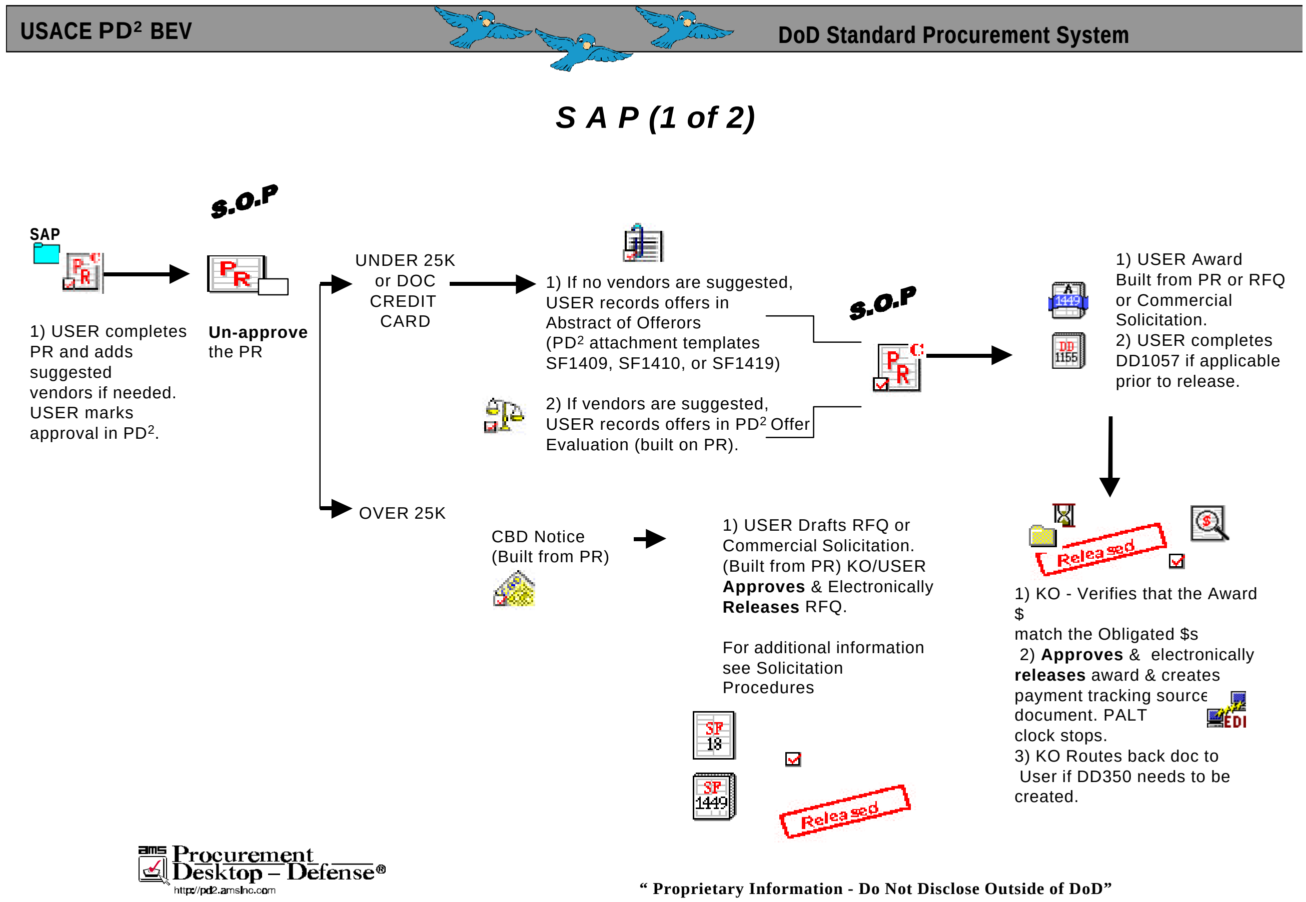
1.24: Post Solicitation (Evaluation/Amendment)



1.25: Simplfied Acquisition Procedures (SAP)



1.26: Simplified Acquisition Procedures (SAP) (SOP Notes)

USACE PD² BEV **DoD Standard Procurement System**

S A P (2 of 2)

S.O.P S.O.Ps & USER INSTRUCTIONS

S.O.Ps:

•**ADUDAR:**
Approve PR temporarily.
Open **Document.**
UN-approve PR.
Complete **Document.**
Approve PR again.
Release document.

If a new vendor needs to be added,
user needs to **un-approve** PR,
add new vendor, and then **re-approve** PR.
If a solicitation or award is created with an unapproved vendor, once that vendor is approved, you will have to delete the vendor and read the approved vendor (almost as if refreshing the data). You do not have to return to the PR (as the PR contains "suggested vendors".

•*New Vendors* cannot be added to PD² Vendor tables without TIN,CAGE, CCR OR DUNS.

•Check http://www.ccr2000.com for valid code.

•NOTE: TIN AND CCR ARE NOT APPLICABLE FOR FOREIGN VENDORS (SEE SECTION 2.2).
Other Government Entities may be included too.

S.O.Ps:
For EDI
•User highlights approved and released document.

•Select Procurement.

•EDI Transmit.

•Select Original, Accept/Reject required, and the necessary transaction type (s).

•Click OK.

•To complete transmission notify SA to transmit.

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1.27: Award

USACE PD² BEV **DoD Standard Procurement System**

A W A R D

AWARD PHASE

DD1155 SAP Purchase Order/ Delivery Order
External SF26 (Pre-existing Awards)

See Section 2.44 for A-E contract
SF26 for All Large Purchase, BOA, & IDIQ
SF1449, SF 1442, All Commercial Awards

User builds External SF26 stand alone.
All others award documents are built from SF33 and SF1449 Solicitation documents, or Direct award documents from PR, Letter, Visa, ABG3. FORMS for SF1442 & SF252 on PARC Web Page .

Award Associated Attachments

CBD Announcement (built on Award)

Route for Review and Approval

1) KO Verifies Award $s match Obligated $s, Grants Approval,
2) Routes it back to User for completion of DD 1057 feeder sheet (if appropriate) or...

S.O.P

1) Re-approve the PR

Released

1) KO **releases** award.
2) **Routes** back to User.
PALT clock stops.

1) User completes DD50, routes it back to KO for approval.

Approved and released award EDI transmitted / web / mailed.

S.O.P

S.O.Ps & USER INSTRUCTIONS

INSTRUCTION:
•User must complete DD1057 Feeder sheet prior to release.
DD 350 report after release.
•Cut & Paste the extended description into/from MS Word when using IDIQ (basic "D" contracts).

S.O.Ps:
•**ADUDAR:**
Approve PR temporarily.
Open **Document.**
UN-approve PR.
Complete **Document.**
Approve PR again.
Release document.

S.O.Ps:
•*Refresh clauses*: Users **shall** hit refresh key on clauses tab before release of solicitation in PD² to bring in most current clause updates from the FAR.
•*New Vendors* cannot be added to PD² Vendor tables without CAGE, CCR, TIN and DUNS. Check http://www.ccr2000.com for valid code.
•All vendors must be approved prior to award

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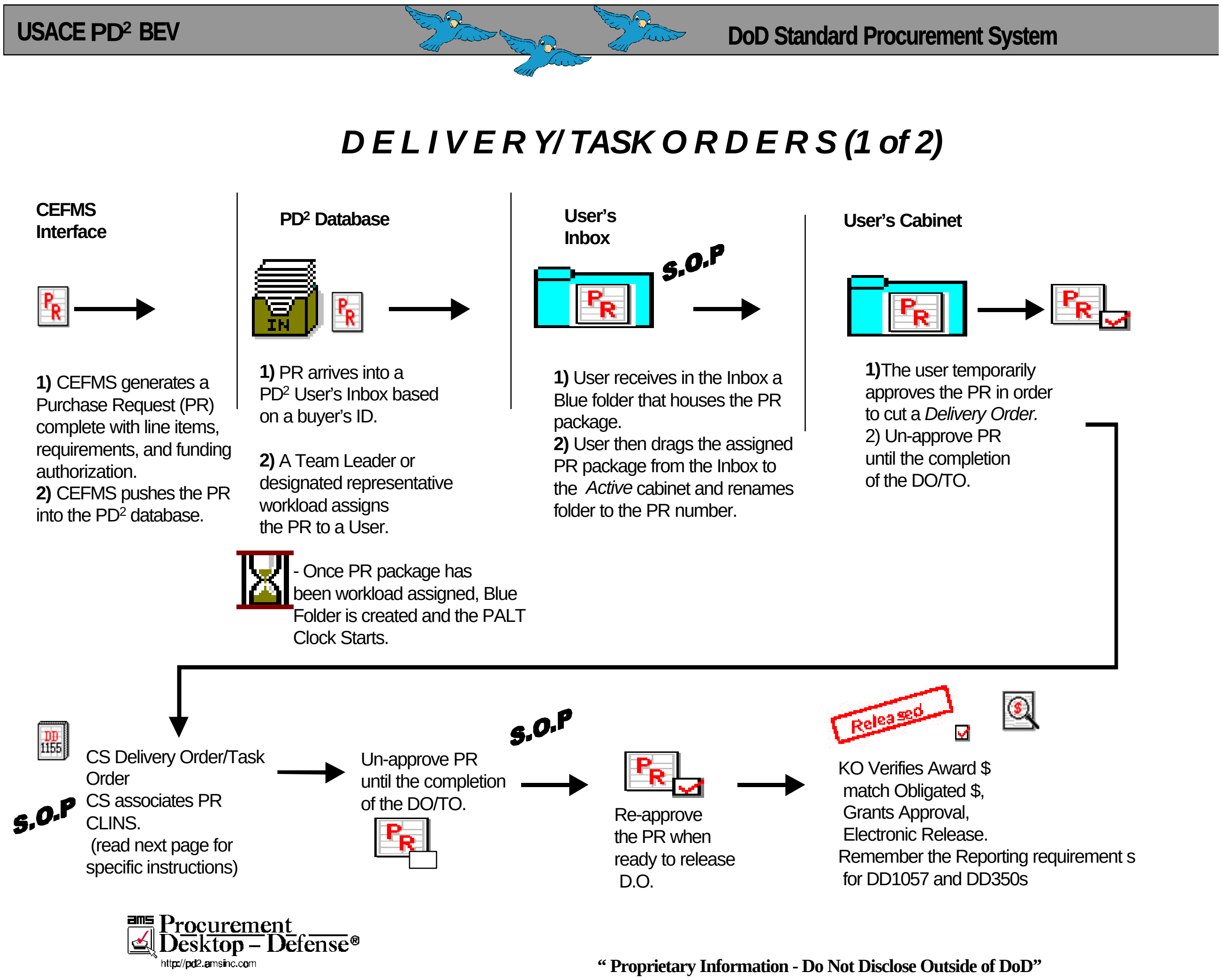
1.28 Delivery Order/ Task Orders



1.29 Delivery Orders (SOP Notes)

USACE PD² BEV **DoD Standard Procurement System**

D E L I V E R Y / TASK O R D E R S (2 of 2)

S.O.P S.O.Ps & USER INSTRUCTIONS

S.O.Ps:

•User highlights the PR and selects DD1155 DO/TO. A "match" screen will appear with the PR on one side and the AWARD on the other. Next - select Attach button and search for and select the base contract. Match the CLINs from the PR and DO by clicking on the CLINs on both the PR and DO match screen. An = sign will appear in the middle which indicates that the CLINs are attached. From this point - continue completing the DO.

•ADUDAR

•**CGGGAR** (Contracts and Modifications):
Certify Funds.
Generate CLINs.
Generate Section J.
Generate document
Approve.
Release.

•Cut & Paste the extended description when using IDIQ (basic "D" contracts).

INSTRUCTIONS:

•CS should check that newly attached CLIN is properly funded.

•EDI directions located in the SAP BEV.

•USER creates DD1057 Prior to release and DD350 After release of the DO/PO.

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1.30 Funded Modification (Admin, Change Order and Termination)

USACE PD² BEV **DoD Standard Procurement System**

FUNDED MODIFICATION (1 of 2)

MODIFICATION PHASE

CEFMS Interface

1) CEFMS generates a Purchase Request (PR) complete with line items, requirements, and funding authorization.

2) CEFMS pushes the PR into the PD² database. (**Alert message is sent to CEFMS buyerid for original PR&C**)

PD² Database

1) PR comes into PD². It arrives into the Team Leader (TL) or Designated Representative's (DR) Inbox based on a buyer's ID.

2) *The modification should not be workload assigned.*

3) TL or DR **routes** PR to the User.

S.O.P

1) User keys the PR number into the Reason for Modification block 14 and attaches PR CLINS (if necessary).

2) User Prepares Mod built from Award.

CS Prepares 1057 Feeder Report (if appropriate).

CS flags Mod: Unilateral or Bilateral.

KO **approves** the SF30, electronic **release**, completes DD350.

NOTES:
- Modifications PR&C that do not affect funding can originate in PD².
- Modifications PR&C that do affect funding must originate in CEFMS.

S.O.P **S.O.Ps & USER INSTRUCTIONS**

S.O.Ps:
Remember to **save** prior to **generation**, and **generate** prior to **approval**.

INSTRUCTIONS:
CS should check that newly attached CLIN is properly funded, from CEFMS.

Mods created outside PCO office are A### Mods. Mods created inside PCO office are P000 Mods.

CS completes DD350, KO approves DD350.

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1.31 Non - Funded Modification (Admin, Change Order and Termination)

USACE PD² BEV **DoD Standard Procurement System**

NON - FUNDED M O D I F I C A T I O N (2 of 2)

MODIFICATION PHASE

Requiring Activity Contractor or KO Identifies need for modification (Hard or soft copy).

→

S.O.P SP 30

1)User keys in PR number into the Reason for Modification block 14 and attaches PR CLINS (if necessary).

2)User Prepares Mod built from Award.

→

CS Prepares 1057 Feeder Report (if appropriate).

DD 1057

→

User flags Mod: Unilateral or Bilateral.

→

KO **approves** the SF30 and electronic **releases** it.

Released SP 30

S.O.P S.O.Ps & USER INSTRUCTIONS

INSTRUCTIONS:
Remember to **save** prior to **generation**, and **generate** prior to **approval**.

Planning PRs follow normal PR process.

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Section 2.0: Standard Operating Procedures

2.1: The Objectives in Implementing S.O.Ps

The objectives of the USACE PD^2 Standard Operating Procedures are to:

- *Preserve data integrity for reference and reporting.*
- *Exploit new "paperless" capabilities such as electronic routing, approval, and storage.*
- *Provide key instructions to reduce confusion and expedite work.*
- *Lay down USACE specific procurement practices to provide built-in controls or double-checks not available in PD^2.*

2.2: Data Integrity S.O.Ps and Instructions

2.21: Security and Passwords

The USACE has a centralized system called U-PASS that maintains user accounts for remotely located systems. With the introduction of PD^2, UPASS will enable users to utilize the same logon and password currently used in other USACE standard systems.

Army regulations require individual user passwords to be changed every six months. It is the responsibility of the System Administrator to notify users of this requirement through the Message of the Day function or other ALERT systems within PD^2 or UPASS.

PD^2 allows for the storage of electronic signatures. These bitmap signatures are directly tied to the user ID.

⇒ Adding or Deleting users who have been removed in error. The new version of PD2 will have that capability, but in iterim here is an SOP:

- Within System Administration, there is a Task called User. Every user is assigned a user ID and profile through this task. Within the first tab of this task (also entitled "User"), there is a box called "Effective Date," with a "From" field (start date) and a "To" field (end date). Typically, while the users are active in the system, the "To" (or end date) is left blank. A workaround to the above problem is that when a user leaves the Contracting office or the Corps (basically meaning they won't be using PD anymore), the day they leave is put in the "To" field, as the end date. By doing this, the user becomes inactive in the system (their log-on user ID and password will be invalid), and a PD license would be freed up for use by a new user. Should this user return to PD, all the SA would have to do is go into the User Task within System Administration and remove the "to" date under that user (provided a PD license is available). This user would then be able to use PD with their original User ID and password.

2.22: Entering Vendors into PD^2

Before adding a new vendor record, PD^2 user should first determine whether the vendor in question has already been entered into the PD^2 database. To check whether the vendor currently resides in the Database, click the ADD button in the contractor field of any contract action document in PD^2. This will activate the CONTACT SEARCH menu. First search by CODE; then enter in the SHORT Code. If searching by name, do not overlook different variations in the vendor's name such as CAGE Codes or official names (i.e. IBM vs. International Business Machines).

If the vendor already exist in the database, select that vendor, and it will be brought into the contractor field within the working document.

Users without vendor management authority should contact the vendor management team. Users with Vendor management authority should proceed with the following steps: If the vendor does not exist in the database, and if the Contract Specialist (Substitute User for Contract Specialist when applicable) wants to add a new vendor at this time, click the NEW selection on the CONTACT SEARCH screen. This will open a VENDOR MAINTENANCE menu. Utilize this menu to add vendor information details. As a minimum, the following information will be required to gain approval for a new vendor in the PD^2 database:

- Vendor Name
- Vendor Size (Small or Large)
- TIN (Tax ID#) – U.S. vendors only
- Parent Company Name (If applicable)
- Parent TIN (If applicable)
- Vendor Categories
- Code (CAGE Code)
- Street Address
- City
- State
- Zip Code
- Phone
- Fax
- SIC/FSC
- Preference Program
- DUNS Code
- CAGE Code
- Contacts Info

Every vendor in the database must have a unique Commercial and Government Entity (CAGE) and Data Universal Numbering System (DUNS) number. If CCR is green, DUNS will be available, since vendors must give DUNS to get CCR registered. If the contractor is registered at the CCR, mark the RYG block in Address Details as Green. If registration is in process, mark Yellow. If vendor is not registered, mark Red. Failure to uphold this rule will result in the vendor database quickly filling up with redundant data. It is in every user's interest to prevent "garbage in - garbage out."

A Contract Specialist can verify a vendor's CAGE or DUNS at http://www.ccr2000.com/, or by calling 1-888-227-2423. The 800-access center requires a DUNS number, as also stated in FAR 4.602(d) to verify contractor registration.

Vendor Approval Process. Only the System Administrator (SA) has the authority to approve additional vendors to the Vendor Record. The addition takes place only after the SA has reviewed the Vendor Load Template. The SA or designated representative (DR), upon making changes or updates, will send out alerts to all users to MOD contracts affected by the vendor record changes.

2.23: Vendor Approval and Database

Within PD^2, a vendor must be approved in order to release any contract action. The SA or DR will be responsible for checking the accuracy of each new vendor entry. The SA or DR will "approve" vendors in PD^2 before release of a solicitation or award.

SA notification should always occur after the addition or modification of a vendor record. A contract cannot be released without an approved vendor. The SA or DR is the only authorities that can approve a vendor. When users have entered a new vendor in the PD^2 database, a call or a PD^2 alert should be sent to the SA or DR to request the approval of the new vendor.

2.24: SA Maintenance of Vendor Database

The SA should run monthly "find duplicates" reports on the CAGE code to determine if duplicate vendor entries have been added to PD^2.
Name and report and location of report

2.25: Other Organization Maintenance

In order to keep contract action reports consistent and accurate, the SA, DR, and Management Team will be the only personnel with access to maintain/approve or issuing, payment, administrative or shipping addresses, points of contact, or offices to the database.

2.26: Default Issuing Offices in Solicitation, Award, Modification, and DO/TO Forms

Contract Personnel must keep the name of the Issuing Office information (Necessary for CEFMS Interface) identified in pre-award, award, or post award documents consistent throughout reporting periods. Otherwise, DD1057 (Monthly Summary of Actions $25,000 or less) or Ad hoc reporting will not provide accurate results.

Consult the SA when:

1.) The issuing office cannot be found in the ORGANIZATIONAL SEARCH screen.
2.) The issuing office address or code is incorrect or missing.

2.27: Completion of DD1057 Feeder Sheets

Contract Personnel should complete DD Form 1057 feeder sheet **prior** to release of the award.

2.28: Foreign Currency Conversion – **To be developed later**

2.3 Electronic Routing, Approval & Storage

2.31: Meaning Of Approval In PD^2 And The Concept Of "Paperless" Files

Approval sheets not only enable the release of award and solicitation forms, but also serve to maintain in the database a record of approving users and time. In many instances, users will add multiple approval sheets.

USACE recognizes that some documents may require "approval" to be recorded outside of the system on hard copy (e.g., Approval documents from the Head of Contracting Activity).

Approval of CT documentation such as Price Objective Memorandums (POMs), Justification and Approvals (J&As), Price Negotiation Memorandums (PNMs), or Letters to Unsuccessful Offerors is not required by PD^2. However, in an effort to keep paper to a minimum, storage and approval of many documents will be completed in PD^2.

2.32: Naming Conventions and PR Notes

In most cases, CEFMS will build the PR. If a manual PR is needed in PD^2, the creation of a Purchase Request (PR) will always prompt the user for a number and description. Within USACE, the *numbering convention* for a PR shall be the standard 14 digit PR&C number.
EX: W22W9K- Julian Date(4 characters) – numbering format(4 characters)
The *description block* shall be edited to describe the actual requirement (item or service (e.g., Computer Maintenance Service), which is to be procured (maximum of 30 characters).

2.33: Assign Workload

CEFMS pushes a complete PR into PD^2. The PR goes into the Inbox of the recipient or the appropriate authority based on that user's buyer ID. The recipient should review and accept or reject the requirement package. The recipient will then workload assign the PR to the appropriate CS/KO. A PALT clock will simultaneously start whenever a document is workload assigned. The PALT can be started on a future date by changing the "Start" on the Workload Assignment screen. The CS/KO will receive the PR in a blue folder in his/her Inbox. Authority must be granted to workload assign documents. If a user attempts to workload assign a document and can not do so, the SA should be contacted.

2.34: Archiving Documents

Archiving is taking documents completely offline to an inactive storage site vice online data storage in PD^2. SAs will develop archiving processes with a later release of *PD^2*.

2.35: Deleting Documents

A Contract Specialist should electronically route any document needing deletion to the SA. The document must have an electronic sticky note attached to it that explains the reason for the deletion request.

2.4: Business Process Considerations

2.41: Business Process Considerations

The transition to PD^2 should mirror the current business processes to the maximum extent possible. There are considerations in that process that require clarification and grounds for changes. Some of the changes required result from the implementation of PD^2. In this section, attention will focus on issues that smooth the process or recommend a change in the business practice. The SA will be an important participant in the process of modification to any and all processes. Particular to note is the existence of CEFMS, a system of record for financial reporting and management.

Sample Desktop Organization

MVK PD2 DESKTOP PROCEDURES

There will be several Shared cabinets created. They will be Active Contracts Cabinet for active contract awards, Inactive Contract Cabinet for closed out contracts or those awaiting close out, and Team Cabinets for each team (CTS, CTC,CTT). This is active and inactive contract cabinets will be accessible by everyone. The team cabinets will be accessible by your respective team members, all Team Leaders and system administration team (SAs).

Each person's desktop will contain their personal cabinet (ex: Sandra's Cabinet). This is the cabinet where you will do your work.

If a PR&C is routed to you or sent to your through Workload Assignment, it will be in you inbox. You would need to move the PR&C to you cabinet to perform any actions against it.

PR&C's for New Actions will be routed to you through Workload Assignment and will be routed to you in a Blue Folder. When the Team Leader Workload assigns this PR&C the PALT clock is started and will end when the award is approved for the associated PR&C. The Buyer or Specialist should rename the folder the PR&C number and continue this process through the procurement process. If a Solicitation is generated from this PR&C, the specialist should rename the folder the Solicitation number and when the Award is created the folder should be renamed the Award PIIN. All documents associated with this PR&C should be placed in this folder. When the award has been approved and released by the Team Leader, it should be moved to the Active Contract Cabinet. This allows you to keep your desktop clear from documents that you are not processing anything for at the time. When you need to do another action on this contract, you will drag it from the active contract cabinet back to your desktop in your cabinet.

PR&C's for Modifications will be placed in the team cabinet of the team responsible for the action. In each team cabinet will be a folder labeled PR's for Modifications. These PR&C’s may be amended CEFMS PR&C’s or new PR&C's. The PR&c's will be placed in the folders by designated workload managers and the hard copy will be passed on to the buyer of the specialist. The buyer or specialist should drag the PR&C's from the folder and onto your desktop. You may have to do a search to locate the contract folder for the actions for which the modification will be done. The file should be in the Active Contracts Cabinet or the SAACONS converted Cabinet if it is a converted award that has had no action on it since PD2 was implemented. If you pull a contract from the SAACONS Award Cabinet for the first time, create a folder for that contract and label it the Award PIIN number. If you get a new PR&C for a modification (i.e. a PR&C with a new number), you need to be sure to reference the new PR&C number in the description block of the modification because the PR&C block on the SF30 will reflect the PR&C in which the original obligation was done.

Once you have completed the modification and it has bee approved and released, you should drag it to the active contracts cabinet.

Remember when you create a folder to keep in mind it is the equivalent to a Contract File that contains all document associated with that contract.

2.42: Requirements Process Considerations

Purchase Request. The CEFMS interface generates a PR, complete with line item detail and funding authorization. This PR is forwarded to PD^2 for further procurement processing. The PR remains unapproved and is workload assigned.

Procurement Request for Contract modifications. Once a PR is received from CEFMS for a contract MOD, it will **not** be workload assigned. The PR&C will be placed in the modification folder since it cannot be consolidated or directly linked to the modification document.
NOTE: It can be attached if funded at the CLIN level and adds CLINS.
NOTE: In order to expedite the process of PR's, it is suggested that the CEFMS users enter appropriate comments.

PALT.- Procurement Action Lead-Time. In PD^2, PALT begins when the PR is workload assigned or on the date in the "Start" field in the Workload Assignment screen. It is a mandatory action within USACE. Authorized personnel can suspend the PALT.

CLIN Structure. The CLIN structure remains constant from CEFMS to PD^2. The established CLINs become the basis for the pre-award document. In PD^2 CLIN structure can be altered without effecting CEFMS, provided the total dollar value remains constant between CEFMS and PD^2. Awards with contract level funding will be interfaced and must be matched to CEFMS PR&C line items.

Modified PRs. Since the PR remains unapproved during the requirements phase, any additional funding PRs (from CEFMS) that come into PD^2 are automatically pulled into the basic PR without modification and are associated with the subsequent pre-award and award documents. However, if this occurs on an already released Solicitation, it may be necessary to create a Solicitation Amendment with the newly defined CEFMS changes.

2.43:Pre-Award Process considerations

Solicitation. The PR has to be approved prior to the construction of a **Solicitation**. Immediately after the **Solicitation** is created, the PR should be *un-approved* to make it available for further funding modifications from CEFMS. The *Bid Opening Date* must reflect the time required from release of the solicitation to the mail out of the package. Prior to approval and release of the **Solicitation**, Solicitations must have estimated dollars for the line items to use auto select clauses.

Run ANALYZE to ensure correctness. There are "failures" that appear on this document that are conditional and have no bearing on the correctness of the overall document. The contracting officer should understand these situations (See also paragraph 2.47).

DRAFT Watermark. A draft watermark appears on the solicitation prior to release. In order to remove the "draft" watermark the solicitation must be released prior to reproduction of the solicitation package.

Here is the procedure #1 from the Knowledgebase : ***Document #*** *2339*
The draft watermark is a flag that indicates that the document has not been officially released. It is removed when the document has been approved and released within the PD^2 system. If you need to remove the draft watermark prior to this time, you can use the FILE-PRINT PREVIEW; FILE-SAVE COPY AS feature. This will not remove the draft watermark from the copy in PD² - only in the copy you make in Word.

1. Highlight the closed document and select FILE-PRINT PREVIEW. This will open the document in Word. (Make sure the document has been generated.)
2. Select FILE-SAVE COPY AS to save the file to any hard drive location. Note that this copy is not in PD² however, you may IMPORT it as an attachment if you wish to keep a record of the action.
3. Outside of PD² open Word, then open new blank file. Select INSERT-FILE and choose the file created in Step 2. This takes the password protection off the document so that you can edit anything in the document including the coversheet form. NOTE: Some documents like the SF33 do not have the form password protected and therefore the document can be opened directly without creating a new document and "inserting" the file. You may have to insert the document you created by inserting the SF33 into another document (that is a double insert) in order to free-up some headers.
4. Double click anywhere on the coversheet form to edit the picture. Click on the watermark and delete the DRAFT text. This tends to be easier then trying to grab the box around the watermark and prevents accidental deletion of other text boxes.
5. Select the FILE-CLOSE & RETURN TO ...menu option. This will close the coversheet picture and return you to the word document.
6. To delete the Draft text from the header, select VIEW-HEADER AND FOOTER. Delete "DRAFT" from the header and Close.
7. Save and close the Word document.
8. In later versions the Draft will be a bitmap rather than a watermark so you will not be able to remove it from the body of the form, only from the headers in this way. There will be certain items that will have the draft removed when approved (vice when released.)

Here are evaluations for procedure from Vicksburg Consolidated Contracting Office

When a solicitation is exported out of SPS prior to the issue date, a “Ready for Release” watermark is superimposed on each page of the document. We cannot wait until the issue date to make the master CD and have the copies made. This would use part of the allotted time given the prospective bidders and would allow the contractor to ask for a delay in bid opening. FAR requires a minimum of 30 days from issue to bid opening.

Presently a System Administrator can remove the watermark. It is not a time-consuming process but because of the number of people with authority to remove the watermark it can delay the process because the SA cannot always take care of this immediately. The process also damages the SF1442 form. The contract specialist must go in and edit the form to get it lined back up. I have been told that it took one person two days to get it looking right.

The following are potential options to deal with this issue:

a) Make the CD copies with the watermark on the solicitation.

b) Set the issue date 10 days prior to the actual issue date in order to get a clean solicitation to make the CDs.

c) Post the solicitation on the Web on the issue date and start the CD reproduction on the same day.

Option (a) is not acceptable because this is a legal document and must not be issued with language indicating that it may not be an official copy.

Option (b) is not acceptable because the official solicitation will have an issue 10 days prior to it being mailed. A potential bidder would have a good argument to request a delay in bid opening because he did not get his copy timely. I do not believe a CBD announcement notifying our bidders that the issue date on the solicitation is actually 10 days prior to the real issue date

Option (c) is not acceptable because some Internet providers do not have 56k download capability. Some rural areas may have telephone lines that do not allow for 56k connections. I presently cannot connect at greater than 28k. The drawings on construction contracts are so large that less than 56k connection is unacceptable.

Commerce Business Daily (CBD). Once the solicitation number is generated in PD^2, the CBD can be prepared in PD^2 and forwarded in an electronic flat file output queue and sent by the SA via FTP. Sites will need to establish a shared location for saving the CBD.

If the process of creating CBDs in PD^2 becomes too time consuming, CBDNet, an authorized means of distribution, is recommended. The Cut and Paste option can be used to save time. This option requires sites to create the CBDs directly within the CBDNet web site.

Offer Evaluation. This tool is not mandatory within PD^2. If using a SF 1442, 252, 33, 26, it is not possible to create an award document from the Offer Evaluation. However, if a DD 1155 or 1449 is used, the award can be automatically created from the actual Offer Evaluation.

NOTE: For EDI action, all the information is automatically populated.

2.44: Award Process Considerations

Architect Engineer (A-E) Type Contracts. An A-E type contract cannot be awarded on the "SF 252" within PD^2. The form in PD^2 is not the *USACE Authorized Version*. An externally generated SF 252 will be used as a cover sheet to a SF 33 award document existing in PD^2. This externally generated document is a USACE standard smart attachment to the SF 33 award. A copy of the document will be available on the USACE PARC Core Team Webpage at http://www.poa.usace.army.mil/sps/.

The award process for "D" type contracts on the SF33 proceeds as normal to the point of "release". The form 252 is completed and becomes an attachment document and cover sheet to the contract. This applies to both the "C" and "D" type contracts.

Users will use the UCF when creating an A-E contract.
The IDIQ procedures are defined in **Appendix D**.

2.45: Post-award Process Considerations

Descriptions and *Extended Descriptions* in "D" Type Contracts. The PR used to create a delivery order may have an *extended description* that may differ from the *extended description* on the base contract. In this case, the PR extended description will appear on the Delivery Order/Task Order (DO/TO) extended description. If the base contract has highly relevant information in its *extended description* and it is desired in future DO/TO's, then a copy of that *extended description* should be saved as a word document for future "Cut and Paste" use. This can only be done prior to the release of the base contract. If the current PR_remarks from CEFMS are desired, they can be cut and pasted as needed.

The line items in the PR will be the same number of line items in the DO/TO's. The line items are tracked one to one. *NOTE: It is recommended that multiple line items be tracked offline in a spreadsheet and monitored. These spreadsheets can be created from within PD by using the "Utilities-Spreadsheet" menu items.*
Numbering of Modifications (MOD). PD^2 does not allow for modifications to be released out of order. There is a facility to view modifications that are in process. *FUTURE VIEW* will allow users the opportunity to determine the impact of modifications in process. Field offices that are currently using their own numbers will have to coordinate the distribution of MODS with Contracting. All Mods created outside the PCO office will be A#### Mods. Any Mods created inside the PCO office will be POOO Mods.

2.46: Closeout Process Considerations (TBD)

2.47: Analysis, Clauses and Local Information

All users are required to run the ANALYZE function on all PRs, Solicitations, and Awards before sending a document for approval. The Contract Specialist is left to interpret the results and make corrections if applicable. Another useful check feature is the PRE-APPROVAL function contained within the approval sheet screen. The PRE-APPROVAL screen will undoubtedly have "Pass" and "Fail" results that may hinge on the status of other checks. As an example, if contract level funding lists – PASS, then line item level funding will undoubtedly read – FAIL. Consequently, "Pass" and "Fail" results are normal in many instances.

Users shall click the REFRESH key on the CLAUSES tab to ensure all clauses are current before generating the final document for approval or release.

In order to utilize AUTO-CLAUSE SELECT, an estimate of the contract value is needed in the contract dollar field so that Clause Logic will properly identify the applicable clauses. Use the "Not Included" check box button instead of "Delete" when the user does not want to use specific clause results.

The LOCAL INFORMATION function is disabled on the current version of PD^2 due to the use of Standard Procurement System Interface (SPS-I) requirements. Utilization of this function will be addressed when it becomes available. The SA will provide two specific fields that can be used, all other non-specified fields should not be used.

Within PD², the DD350 must be created "**after**" release of an award. **This is not the current practice and will require a business process change at the local level. The Contracting Officer should run a Pre-approval check prior to "signing"/"releasing" the award to determine the correctness of the document that will be the basis of the DD350.**

Section 3.0: Getting Help from the PD^2 Support Team

A PD^2 Support Team that has been established at USACE to provide PD^2 users immediate assistance in solving work related issues. This team is composed of Power Users and Authorized SPS Help Desk Callers. This team will provide immediate attention and properly prioritize each issue.

The goal of the PD^2 Support Team is to facilitate long term success with SPS.

3.1: USACE Important Contacts

	Phone Numbers	E-Mail / Internet
PD^2 KnowledgeBase	***(First Source of Help)***	http://pd2.amsinc.com/spskb.nsf
Core Team:		
Natalie Allen	(817.978.2132)	Natalie.C.Allen@swf02.usace.army.mil
Linda Anderson	(505.342.3451)	Linda.j.anderson@spa02.usace.army.mil
Charlot Barney	(206.764.3621)	Charlot.a.barney@usace.amy.mil
Steve Brown	(502.582.6541)	Steven.d.brown@lrl02.usace.army.mil
Glenn Nishida	(503.808.4604)	Glenn.a.nishida@usace.army.mil
Cathy Pelekakis	(410.962.4136)	Cathy.pelekakis@usace.army.mil
Dolly Colwell	49.611.816.2672	Dolly.M.Colwell@usace.army.mil
Kathryn Thompson	(907.753.2644)	Kathryn.L.Thompson@POA02.usace.army.mil
Theda Fortier	(217.352.6511)	t-fortier@cecer.army.mil
Sharon Howard	(540.665.4083)	Sharon.L.Howard@usace.army.mil
Janet Taylor	(912.652.5088)	Janet.r.taylor@sas02.usace.army.mil
Kevin Doyle	(502.582.6311)	Kevin.j.doyle@lrl02.usace.army.mil
Sandra Mims	(601.631.7242)	Sandra.K.Mims@mvk02.usace.army.mil

Also TRADOC has a Website with their SPS SOPs.(http://www.tradoc-acq.army.mil/spssop/). These may help fill in the gaps the CORE team omitted or that has evolved since development of SOPs in April.

3.2: What to do when encountering a problem?

When encountering a problem, then….

Attempt to replicate issue & confirm steps taken…
Ask others if they have encountered the same thing.

See the user manual for instructions

If the issue is related to Terminal Server and not PD², or a CEAP hardware/software/communication/database problem:
Local System Administrator (LSA) must open a remedy ticket with CEAP HOT LINE at 1-800-531-4472. The only individual who can clear this ticket is the individual who opens the ticket. The local SA will be required to communicate with the user until the problem is resolved. SPS Application Problem: The local SA that is authorized to make the call to the AMS hotline will proceed as discussed herein**. If it is a PD² issue, please continue. Only the LSA can make this determination.**

Search on the PD² KnowledgeBase for a solution or **Appendix A**.

http://pd2.amsinc.com/spskb.nsf
⇓

Contact LSA (by Tel., Email, PD² alert, in person).

⇓

Explain Issue Step by Step (Fax Screen Shots if helpful. Use *PRT SCR & ALT* button and *Paste* to Word).

⇓

Have LSA Record the Call and Issue Description
LSA can Categorize (Functional or Technical) & Prioritizes Issue (Critical or Non-critical) and report the status back to the user.

⇓

LSA Analyzes Issue and attempts to **Replicate Error in Test Database**

⇓

LSA Cannot Resolve Issue	**LSA Can Resolve Issue**
⇓	⇓

Reviews AMS Knowledge Base at www http://pd2.amsinc.com ⇓ or	**LSA Instructs user over the phone**, records resolution, and closes issue. ☎ + ⓘ ⇓
Authorized SPS Help Desk callers Cannot Resolve Issue ⇓	
***Authorized* caller phones SPS Help Desk (Fairfax, VA) and reports issue** 1-800- ☎	**ISSUE RESOLVED & RECORDED!**
	Determine if this is an issue for lessons learned or for the Core Team's mailing list ____ Yes ____ No Items specified as YES, should be sent to a Core Team member so that it can be posted on the PARC home page for analysis. Below is listed the SOP for submission of software change proposals for SPS. PMO has established a Joint Requirements Board which reviews any proposed changes from the services or from AMS. Army has structured their approach for change proposals. Design Center Lee has worked with Army to create a Configuration Control Board for capturing the changes to requirements. Representative from each of the PARCs from the MACOMs are members of this board and will meet quarterly. This corporate approach will expedite the process by which requirements of AMS are altered. In light of this. USACE has dovetailed into this process using the SOP listed below.

PROCESS for CHANGES TO SPS SOFTWARE

CONTACT LOCAL POWER USER –EACH OFFICE SHOULD HAVE DESIGNATED POWER USERS IN SPS, NOT SYSTEM ADMINISTRATORS
DISCUSS MERIT OF CHANGE
DOCUMENT CHANGE – EVALUATE BENEFITS, CHANGES TO BUSINESS RULES, ETC..
CREATE SCREEN DUMPS/CAPTURE/FAXES AND OTHER SUPPORT DOCUMENTATION
FORWARD SOFTWARE CHANGE PACKAGE(SCP) TO CORE TEAM REPRESENTATIVE
CORE TEAM MEMBERS EVALUATES CHANGE PACKAGE AND EITHER REJECTS OR FORWARDS SCP TO USACE SPS PROGRAM MANAGER
USACE SPS PROGRAM MANAGER FORWARDS SCP TO OPARC AND OPARC FORWARDS SCP TO ARMY SPSP CHANGE COMMITTEE

Appendix A: Troubleshooting Guide

This section seeks to address some common PD^2 problems/questions along with appropriate solutions. For more information on how to perform an action in PD^2, first read through the user's manual and/or on-line Help. If all else fails, contact the closest Power User for coaching and advice.

Potential Issues / Troubleshooting

Purchase Requests and Awards

PRs are intricately connected to the Award in the funding process. In order to release an award in PD^2, the PR must be adequately funded. PD^2 has been programmed to compare the award amount (obligated funds) on the award document to the committed amount funded on the PR. If the PR commitment amount is less than the award amount then PD^2 will not allow the user to release the award.

The best way to overcome the issue when amounts differ is to return to the PR and *unapprove* it. Adding an additional approval sheet and setting it to unapproved can do this.

Then re-establish the correct amount of funding on the PR (provided that CEFMS reflects adequate funding).

Approve the PR.

Return to the award document and re-release. This issue should be resolved.

Clauses: Required vs. Required When Applicable

Clauses marked REQ (Required) in a clause template cannot be deleted from a solicitation or contract. *NOTE: With the next clause download, NO clauses should come in REQ, therefore, they can be deleted.*

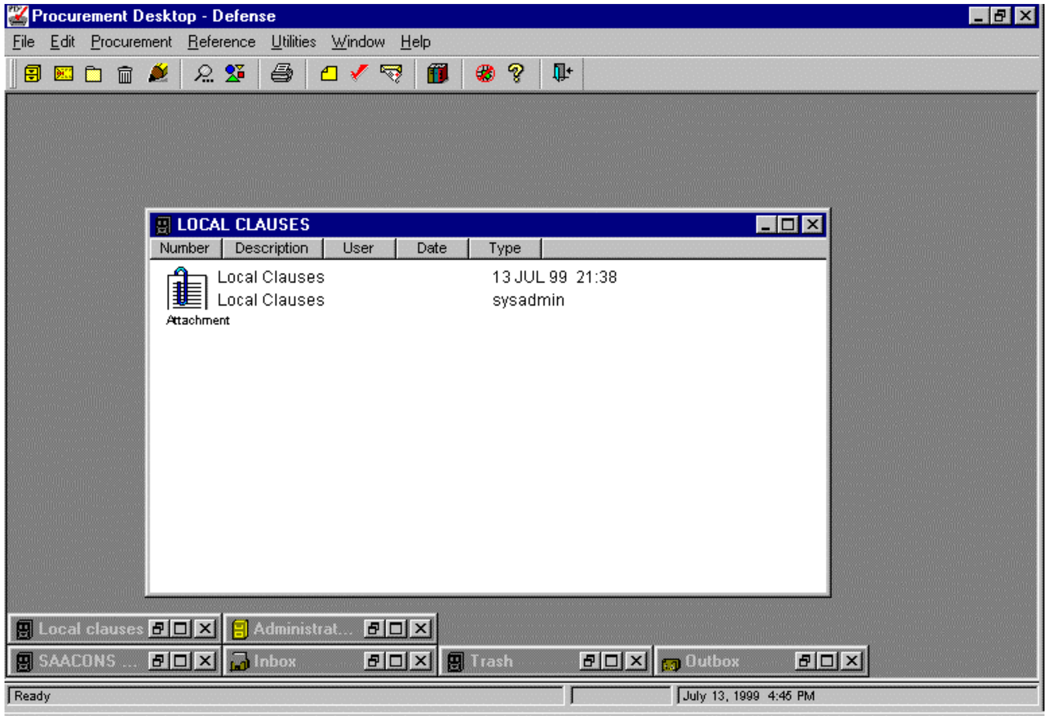
If a clause is found in a template that should be marked RWA (Required When Applicable), contact your system administrator to change the template.

Clauses: Outdated

American Management Systems, Inc. (AMS) will publish new FAC/DAC files within two weeks of a new FAC or DAC release. AMS does not update local clauses (these include EFAR/AFAR/ and LOCAL TEXT). It is the responsibility of each site to maintain LOCAL TEXT clauses. Here is a screen dump showing how to entered local clauses.

Inserting Local Clauses into PD2 Documents

Enter the Team Cabinet labeled LOCAL CLAUSES
Double Click on the attachment labeled Local Clauses



Potential Issues / Troubleshooting

It is the responsibility of the SPS Program Manager (USACE) to maintain EFARS/AFARS clauses.

If the PD^2 version of the FAC/DAC is out of date in *either* the Reference Library or the Clause Database the SA updates from AMS. Please contact the LOCAL system administrator to download the newest files.

Saving Solicitations/Contracts to Disk

All solicitations can easily be sent out on disk.

First close the document and highlight its icon.

*Select **File; Print Preview**. After a lot of testing, moving/clicking the mouse DOES NOT slow down or stop processing during print preview, auto clause selection, or CLIN/document generation.*

Select ***File; Save Copy to*** and select the disk location. Notice that the option exist to select ***File; Print*** and choose specific pages to print.

User Authority

When PD^2 is in actual usage, a user may not have the appropriate authority to either view documents, perform certain functions, or approve certain documents. If the user believes that such authority is needed, then contact the local system administrator.

Potential Issues / Troubleshooting

Warning Messages

When PD^2 encounters a problem in the database, it displays a warning message and often immediately closes itself down.

To assist in resolution, write down the exact text of the warning message before taking any other steps. An alternate solution of documenting the warning message is to utilize the screen print function.

Always wait until the micro-help says, “Ready” before continuing with other tasks. NOTE: *After a lot of testing, moving/clicking the mouse DOES NOT slow down or stop processing during print preview, auto clause selection, or CLIN/document generation.*

Appendix B: Things to Remember about PD^2

HELPFUL HINTS

1. When PD^2 initially opens up, select WINDOWS from the pull down menu, then click on TILE to display all cabinets on the desktop.
2. Do not work on documents in the inbox or outbox or search window.
3. Highlight documents in order to associate them with others (build a Solicitation off a PR).
4. There is usually more than one way to perform a task.
5. To unapprove a document, add another approval sheet.
6. To pull up the perpetual calendar, put the cursor in the date field, hold down the "Shift" key, and double click the mouse.
7. When PD^2 opens up MS Word to display a document for editing, always be sure to *EXIT* MS Word to return to PD^2 (instead of just closing the document and leaving MS Word open).
8. Use the microhelp for status of system activities.
9. Do not minimize the documents; close them instead.
10. When generating the CLINs or document, always wait for the completion prompt box before proceeding (i.e., 1 of 1 CLINs built).
11. Always add the user name at the end of a route list so that the document is automatically returned at the end.
12. Funds must be certified (for user purposes, the user is "verifying" funding, rather than "certifying") before approving and releasing an award. *(Note: Even $0 funds have to be certified.)*
13. To update or edit a document, double-click on the document icon.
14. To create a new document use the menu options.
15. In order to have the inspection and acceptance table pull forward into the generated document, select "Supply" from the Contract Category field in the Document Options Template window.
16. Save documents before generating.
17. Approving a document makes it read-only.
18. Generate before approving and releasing.
19. Note which cabinet is active when processing PD^2.
20. All vendors must have a code prior to approval
21. Sign DD350s prior to approval
22. Logoff properly through the File Menu option; avoid using the "X" in the upper right hand corner
23. Use the KNOWLEDGE BASE for answers "pd2.amsinc.com/spskb.nsf"

Appendix C: NOTES TO THE SYSTEMS ADMINISTRATOR(SA)

This section seeks to address the Systems Administrator and encourage efficient and effective use of the PD^2 instrument.

1. The Resident Management System (RMS) is a new system due to come into the USACE. See memorandum at http://www.hq.usace.army.mil/cepr/parc.htm for guidance on SPS/RMS actions.

2. SA is reminded to run reports to determine if award documents generated require the production of the DD1057 or DD350. If required, then use system alert to inform user of the requirement to conform.

3. For AUTOCLAUSE SELECT, the user should click “Not included” vice “Delete” for Clauses not wanted.

4. The CBD Announcement flat file created does not meet current GPO Standard regulations. The solution is for the SA to manually edit the CBD flat file or the CS to submit the document via the CBDnet and enter into the PD^2 .

5. If the SA changes system defaults for vendor eligibility to be checked, it will go out to all users.

6. The procedures for the use of smart text: TBD - Local help can be added here to

Appendix D: IDIQ Type Contract Work Solutions

Problem: Under current business practices within USACE, many sites are currently using a Max Quantity of 1 (one) in all IDIQ type contracts. This may be under a "Lot, Lump Sum, Job, etc" Unit of Issue. Within PD^2, when it comes time to cut a delivery order on this contract, an available max quantity of 1 minus a Delivery Order Quantity of 1 is equal to Zero. Now your contract has been fully ******.

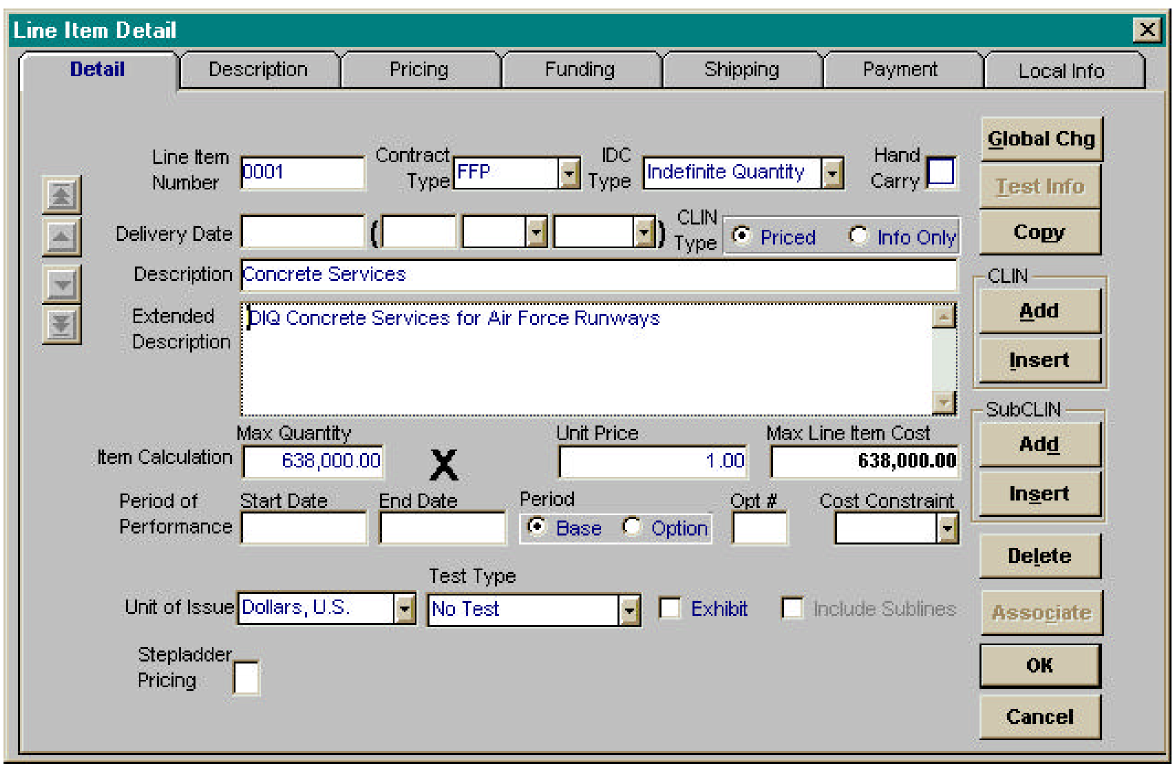
PD^2 accommodates the creation of IDIQ type contracts in several ways. The USACE Core Planning Team decided to leave it up to the individual sites to determine the best way to go about creating new IDIQ type contracts within PD^2

The following Options are listed in order of convenience. All options are currently being used throughout the DoD as a reference.

Option #1 – *Dollars, U.S. as Unit of Issue*

Within this work solution, the key points the users must remember is that the **Total Dollars** (which in most cases is what USACE is tracking) be placed within the **Max Quantity Field**, **Dollars, U.S** be chosen as the **Unit of Issue**, and **One (1)** be entered within the **Unit Price** field.

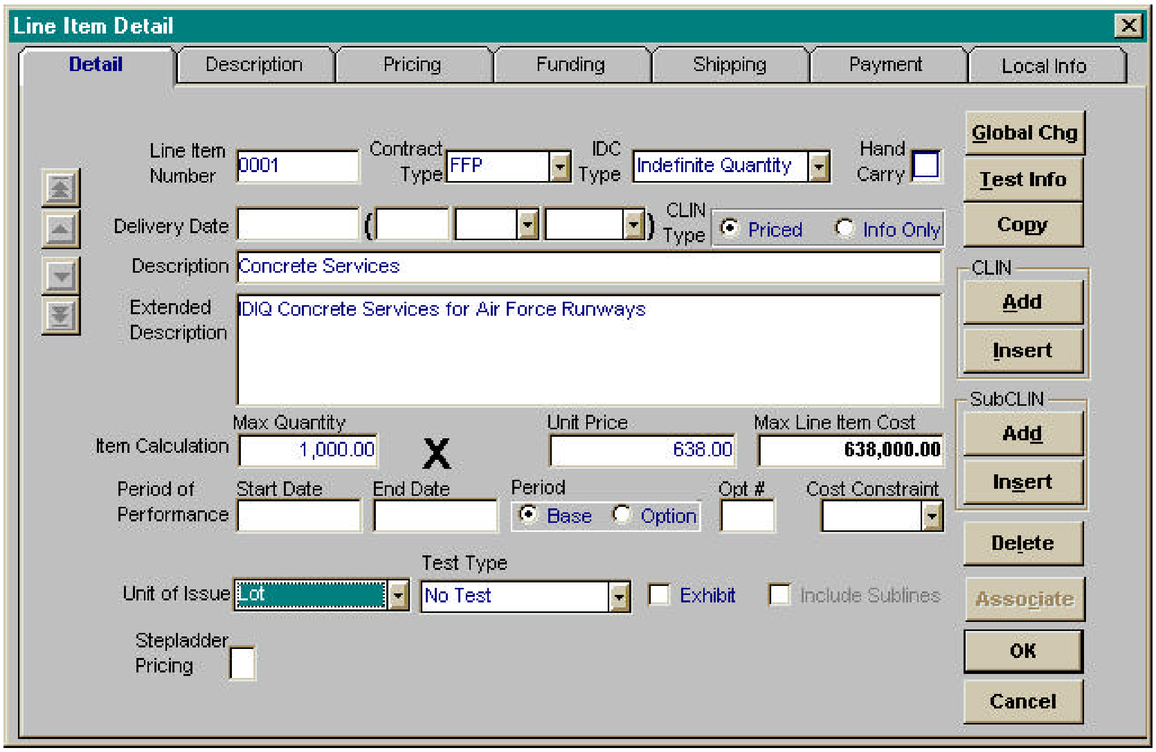
This will list the correct Max Line Item Cost and read 638,000 Dollars, U.S x 1 = $638,000. On all subsequent Delivery Orders, the user must make sure that on any associated PR&C, the same methodology is used. This work solution allows the contracting shop to always track the total dollars spent on each line item on an IDIQ type contract.



Option #2 – *Estimate the Maximum number of Delivery Orders (DO's) you might make on this IDIQ.*

By making a "high-ball" estimate on the total number of DO's that may be cut on this IDIQ (i.e. 1000), you now have a true Max Quantity to work with. The next required step is to divide your total cost (638,000) by your max quantity (1000). This will let you know what needs to be placed within the Unit Price field (638).

The nice feature to this work solution is that you can use any Unit of Issue you choose. In addition, the quantity on the associated PR&C's, and therefore DO's can be One (1). This seems to be no different than the current way most sites currently cut DO's off IDIQ type contracts.



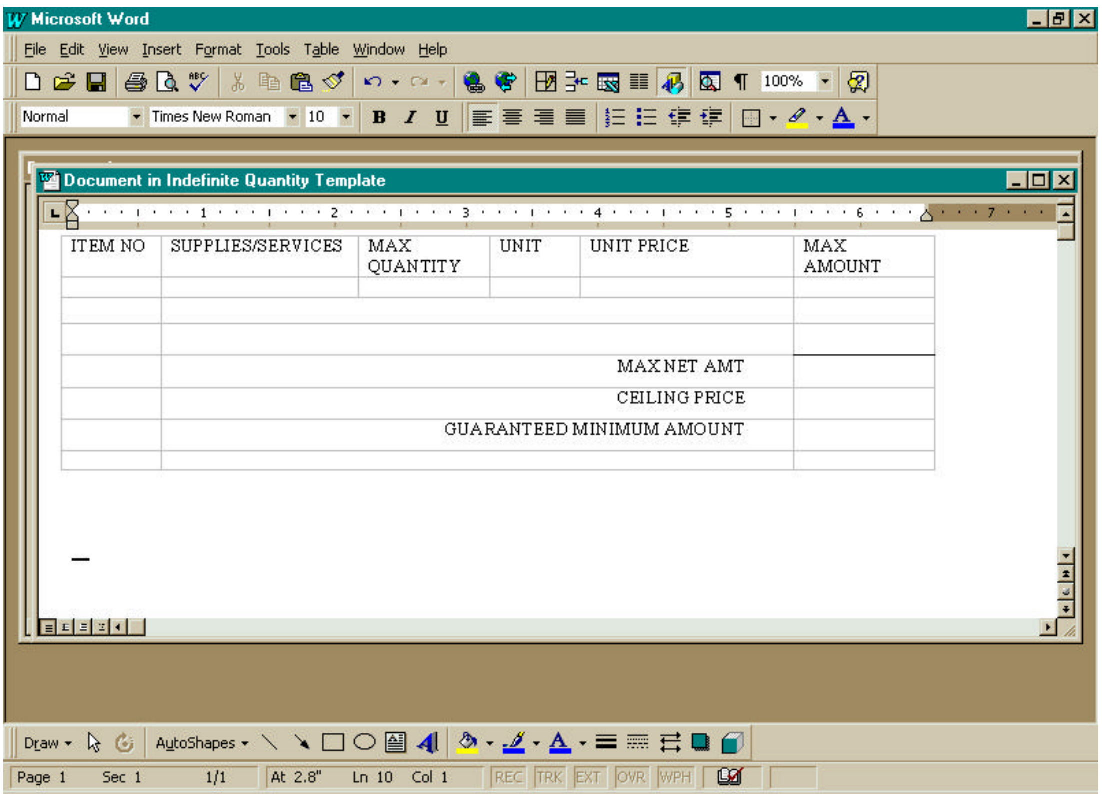
Option #3 – *Have your SA make a change to the CLIN Template via the Sys Admin Task.*

This last work solution can be done independently, or in conjunction with Option #1. Dollars, U.S., or any other Unit of Issue can be used in conjunction with this option.

Within PD^2 there are a number of CLIN templates. One exists for each Contract Type (FFP, CPAF, etc) as well as for each IDC type (IDIQ, RQMTS, etc).

This allows PD^2 to take the information you have entered in your line item detail screen and populate that into a readable and printable format (MS Word). This change would **only** be made to IDIQ type contracts.

Within this work solution, the user will follow the steps in Option #1 by placing the total Max Amount of the Line Item within the Max Quantity field. Below is how the actual Line Item will appear after your generation of the CLINs and document **without** making any changes.



Since we are placing our total cost within the Max quantity field, it is possible to change the way PD^2 will print out our line item.

- We can change the CLIN template so that the *Max Quantity* field will read *Max Dollars*.
- Then change the *Unit Price* field to read *Quantity*.

Your System Administrator can change the fields to meet your particular sites needs. An example is shown on the following page:

A key concept to keep in mind is that the screen within the Line Item Detail will NOT change. This change within the CLIN Template only changes the way the final document will appear as a MS Word document that is either sent hard copy or soft copy to the contractor/firm.